

Institutions matter.

A discursive perspective on inclusion

Paper for the WINIR 2014 Conference, London

Session: 3.2

Word count: 4181

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Summary

Inclusion has been increasingly addressed by two apparently unequal fields of research: the educational and the management discourse. In this contribution, we adopt a discursive perspective to explore how inclusion as a multilevel phenomenon is institutionalized in a German based car manufacturer.

After briefly discussing the two discourses separately, we illustrate that despite significant dissimilarities regarding the underlying premises, the educational and management discourse draw upon similar theoretical considerations with regards to the organizational implementation of inclusion.

In our contribution we claim that inclusion is a multilevel phenomenon, which is discursively institutionalized and therefore requires a dynamic perspective to be implemented successfully in practice.

Introduction

Inclusion has been increasingly addressed by two apparently unequal fields of research: the educational and the management discourse. While the former advocates the concept based on socio-political rationales, the latter draws upon performance-oriented measures for justification. On closer examination both discourses are not as distinct as generally presumed.

Both discourses consider the individual's experience as the core of inclusion. In addition, both also refer to similar theoretical considerations with regards to the organizational implementation. From a management perspective, a neglected area on inclusion, however, concerns the circumstance that it is not merely an individual or group-level phenomenon but is closely related to the societal level just as the educational discourse exemplifies.

After discussing the educational and the management discourse on inclusion separately, we compare both discourses before outlining our central argument and research question. Afterwards, we introduce the discursive model of institutionalization (Phillips et al., 2004) as our theoretical framework. We hold the view that the way the discourse on inclusion is (re-) enacted determines its institutionalization, whereas the emerging institutions, in turn, enable or constrain the individual. We contribute to the emerging scholarly discourse by providing a dynamic and recursive perspective, according to which inclusion represents a multi-level phenomenon.

Our central research question is: How is inclusion institutionalized in profit-oriented organizations? To explore this question, we have commenced conducting

our empirical study, which will be continued in our focal organization. In the following, we present some preliminary findings.

Inclusion: The educational and management discourse

The educational discourse on inclusion

The term *inclusion* is widely applied in the educational discourse to signify the process of including students with special educational needs (SEN) and impairments into regular school systems (Koster et al., 2009). Over the past several decades, the United Nations' *Universal Declaration of Human Rights*, the *Salamanca Statement and Framework for Action*, (UNESCO, 1994), and the *United Nations Convention on the Rights of Persons with Disabilities (UN-CRPD)* (UN, 2006) have advanced the concept of inclusion on a global scale. After ratifying the UN-CRPD, UN member states are subsequently obliged to adopt their national legislation in order to meet the prescribed requirements for an inclusive school system.

Addressing the educational discourse, Farrell (2000) defined inclusion by stating that '[f]or such children to be fully included they should take a full and active part in the life of the mainstream school, they should be valued members of the school community and be seen to be integral members of it' (Farrell, 2000: 154). Despite this socio-political explanation, a general definition of inclusion is lacking in the educational discourse. While some studies refer to an explicit description of inclusion, others rely on an implicit understanding (Koster et al., 2009, Bossaert et al., 2011).

To implement the concept of inclusion in educational organizations, Booth and Ainscow (2002) developed an *Index for Inclusion*. The model proposes to (1) produce

inclusive policies, (2) create inclusive cultures, and (3) evolve inclusive practices. Yet, the model, which is based on the premise of 'Education for all' (Ainscow, 1998: 70) addresses the societal responsibility of responding to all types of dissimilarities within educational organizations. That is why, the educational discourse on inclusion is dominated by socio-political arguments (Farrell, 2000), which are embedded in (supra-) national legislative systems.

The management discourse on inclusion

In recent years, the management discourse – in particular the diversity management discourse – has been increasingly addressing inclusion. Introducing it as a novel construct with an infant theoretical base (Nishii, 2013, Shore et al., 2011), inclusion is presented as a means to overcome two significant problems of today's diverse workforce: (1) the exclusion of employees through formal and informal policies as well as (2) the exclusion through individual perceptions of not being part of the organization (Mor Barak, 2011). The discourse on inclusion, is closely related to the notion of *diversity* (Ferdman, 2013, Roberson, 2006) as exemplified by Oswick and Noon (2014).

Mor-Barak and Cherin (1998), for instance, referred to Festinger's Social Comparison Theory as well as Mead's Symbolic Interaction Theory to explicate the relationship between individuals and groups. Afterwards they introduce their inclusion-exclusion continuum, which is supposed to measure 'the degree to which individuals feel a part of critical organizational processes such as access to information and resources, involvement in work groups, and ability to influence the decision making process' (Mor-Barak and Cherin, 1998: 48). Later, this continuum represented the theoretical foundation for Mor-Barak's model of organizational

inclusion. Following an input-output configuration, the model argues that personal diversity characteristics and the corporate culture determine the sense of inclusion or exclusion. Thereupon, the employee's perception results in attitudinal (well-being/ job satisfaction) and behavioural (task effectiveness/ organizational commitment) outcomes (Mor-Barak, 1999).

Later, Shore et al. (2011) differentiated between inclusion and diversity and drew upon Brewer's (1991) Optimal Distinctiveness Theory. According to Brewer (1991) social identity stems from the tension between the human need for similarity and the countervailing need for uniqueness. Thus, Shore et al. (2011) put forward an alternate concept of inclusion by referring to it 'as the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness' (Shore et al., 2011: 1265). Conceptualizing inclusion in this manner is an exception (Oswick and Noon, 2014) because it points out that inclusion results from the interrelationship between a subject's individual experience and multiple social identities (Ferdman, 2013). Despite this conceptual advancement, Shore et al. (2011) developed a model of inclusion, which is configured in a similar input-output logic as Mor-Barak's. Three contextual factors determine the perception of being included in a work group: (1) an inclusiveness climate, (2) an inclusive leadership and (3) inclusiveness practices. Then, the employee's perception of work group inclusion leads to the same attitudinal and behavioural outcomes as indicated by Mor-Barak (1999).

Despite recent claims for the novelty of inclusion (Nishii, 2013, Shore et al., 2011), the social-psychological and sociological underpinnings mentioned above

relativize this assumption. With regards to the abovementioned studies, inclusion is mostly conceptualized in an input-output configuration. It addresses the individual and group level to identify attitudinal and behavioural indicators that affect the overall performance of the organization.

Bridging the educational and management discourse on inclusion

A comparison between the educational and management discourse on inclusion reveals two overarching themes: (1) distinctiveness and (2) similarity.

First, both discourses are distinct. The educational discourse on inclusion is dominated by socio-political arguments (Farrell, 2000), which are grounded in (supra-) national legislative systems, while the management discourse explicates the necessity for inclusion with regards to performance-related reasoning. Yet, neither does the educational discourse solely refer to socio-political rationales, nor does the management discourse neglect broader societal issues. We, therefore, argue that these two general modes may not be treated as oppositional but rather as a continuum of possibilities.

Second, both discourses are sufficiently similar. Although educational organizations and profit-oriented enterprises represent distinct social entities, conceptual similarities exist. The educational inclusion concept by Booth and Ainscow (2002) points towards practices, policies and cultures for creating inclusive schools, while the models by Mor-Barak (1999) and Shore et al. (2011) refer to the same antecedents for profit-oriented organizations. Taking the present degree of interdiscursivity into account, we, therefore, claim that the educational and the management discourse are not mutually exclusive.

We conclude that the management discourse on inclusion is indeed distinct but at the same time sufficiently similar to the educational discourse. This premise, yet, raises the question of how inclusion is actually institutionalized in profit-oriented organizations.

Theoretical framework: a discursive perspective on inclusion

In our contribution, we refer to the discursive model of institutionalization by Phillips et al. (2004) to examine how inclusion is discursively institutionalized in organizations. We argue that inclusion is a multilevel, social phenomenon, which is constructed in discourse (Fairclough, 2005, Phillips and Hardy, 2002). We adopt a discursive lens because it enables us to explore how inclusion is discursively produced within profit-oriented organizations through macro and micro levels of texts (Van Dijk, 1997). In doing so, our paper contributes to discursive management research (Kwon et al., 2014, Vaara and Tienar, 2008, Grant et al., 2004) while also relating to the nascent stream of discursive studies on inclusion and diversity (Oswick and Noon, 2014, Zanoni and Janssens, 2007). The discursive model of institutionalization associates Critical Discourse Analysis (CDA) with Institutional Theory.

First, with regards to CDA, we define discourse as ‘a particular way of representing certain parts or aspects of the (physical, social, psychological) world’ (Fairclough, 2005: 925). Moreover, a discourse consists of multiple, written, oral, or visualized texts (Reisigl and Wodak, 2009). Taking into account that CDA places an explicit focus on the relationship between discourses and the general social reality (Keller, 2004), it adds to the present interest of investigating how inclusion as a

multilevel phenomenon is discursively institutionalized in profit-oriented organizations.

Institutional Theory usually describes institutions as 'historical accretions of past practices and understandings that set conditions on action' (Barley and Tolbert, 1997: 99). Therefore, institutions are socially constituted through discourse with the potential to sanction nonconformity. Finally, institutions are produced through the process of institutionalization (Phillips et al., 2004, Scott, 1987).

The discursive model of institutionalization is depicted in Figure 1. It proposes a mutually constitutive relationship between action, texts, discourse and institutions to determine the process of institutionalization. The upward, diagonal arrows signify how actions affect discourses (*discursive effects of action*), while the downward, vertical arrows illustrate how discourses influence actions (*institutional effects of discourse*).

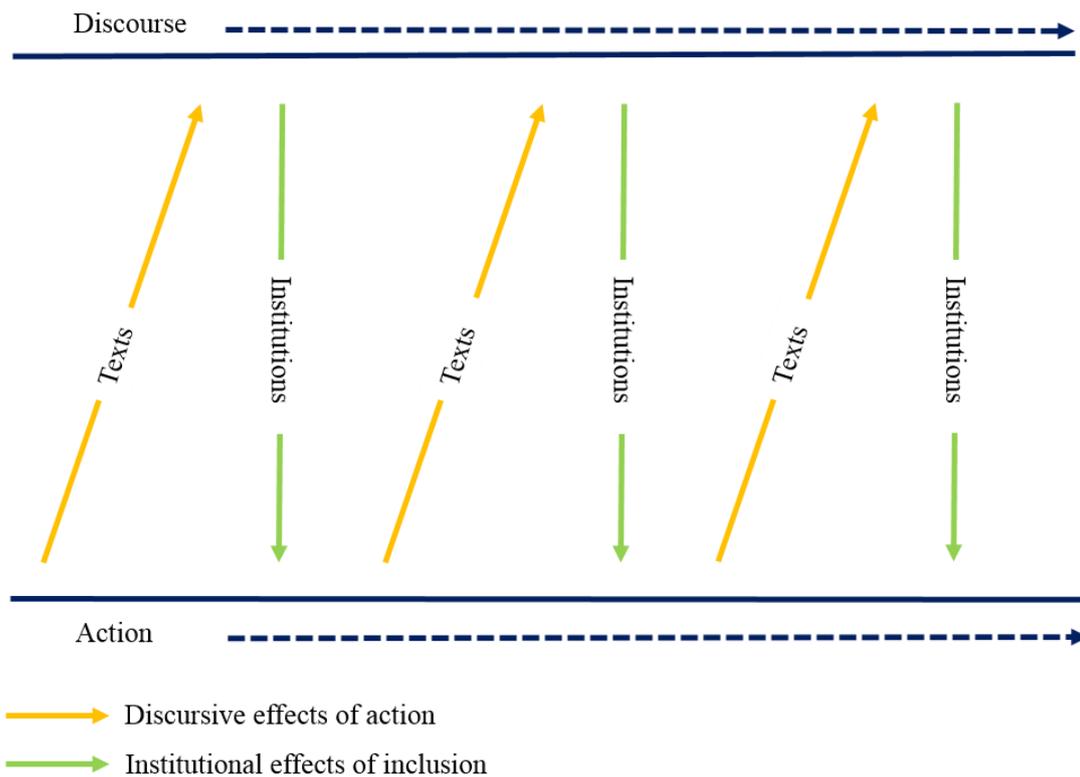


Figure 1: The Relationship between Action and Discourse (Phillips et al., 2004: 639)

(1) *Discursive effects of action.* The model argues that individual actions influence discourses through texts. Afterwards, texts get embedded in discourses and have the potential to stabilize or change it. However, since many actions occur in organizations, only those actions holding the potential to influence the discourse are addressed by the model. According to Phillips et al. (2004) two factors increase the likelihood that such texts will be produced: if actions are (1) novel or surprising and if they (2) affect the organization's legitimacy. Afterwards, three additional factors determine the likelihood that these texts will become embedded in discourses. This is the case, if they are (1) produced by central actors, (2) represent recognizable genres, and (3) establish connections with other texts and discourses.

(2) *Institutional effects of discourse*. The model proposes that discourses influence actions through institutions. Therefore, it is more likely that a discourse produces an institution if the discourse is (1) coherent and structured and if (2) it is supported by an overarching discourse without being in intense rivalry with other discourses. Finally, these rules of the game in turn enable and constrain individual actions. As the model appreciates the mutually constitutive relationship between actions, texts, discourses and institutions recurrently, it classifies to explore how inclusion is discursively institutionalized in profit-oriented organizations.

We argue that the way the discourse on inclusion is (re-) enacted, determines its institutionalization in an organization, whereas the emerging institutions, in turn, enable or constrain the individual actor.

Methodology

Research design

In order to understand how inclusion is institutionalized, we adopt a qualitative, interpretative approach using a single, longitudinal case study (Yin, 2014). The case study method is appropriate, if the research question (1) addresses operational links over time and (2) if it points towards complex, contemporary phenomena over which there is no behavioral control (Yin, 2014). These requirements are met with regards to the aforementioned research question for the following reasons. First, we seek to explore the procedural aspects of institutionalization and in doing so we aim to investigate the recursive relationship between action, texts, discourses and institutions. Moreover, adopting the present procedural perspective illustrates that the process of institutionalization is highly context-dependent, which in turn calls for an exploration in a non-contrived setting. Finally, to explicate how inclusion is institutionalized, we have to study the present case at different points in time in order

to gain a holistic and deep understanding. This in turn calls for a single, longitudinal case-design with regards to our focal organization.

Data collection

In order to address a broad range of insights on inclusion and to reduce bias via data triangulation (Yin, 2014), we relied on multiple sources of evidence.

In an initial step, we commenced by collecting **public secondary accounts** on inclusion, which were organized around the *normative, regulative and cognitive pillars* (Maguire/ Hardy 2009). The *normative pillar* refers to public news data, which were selected in accordance with predefined keywords (e.g. “inclusion AND enterprises”, “inclusion AND companies et cetera) using the online database *LexisNexis* and *WISO* as depicted below.

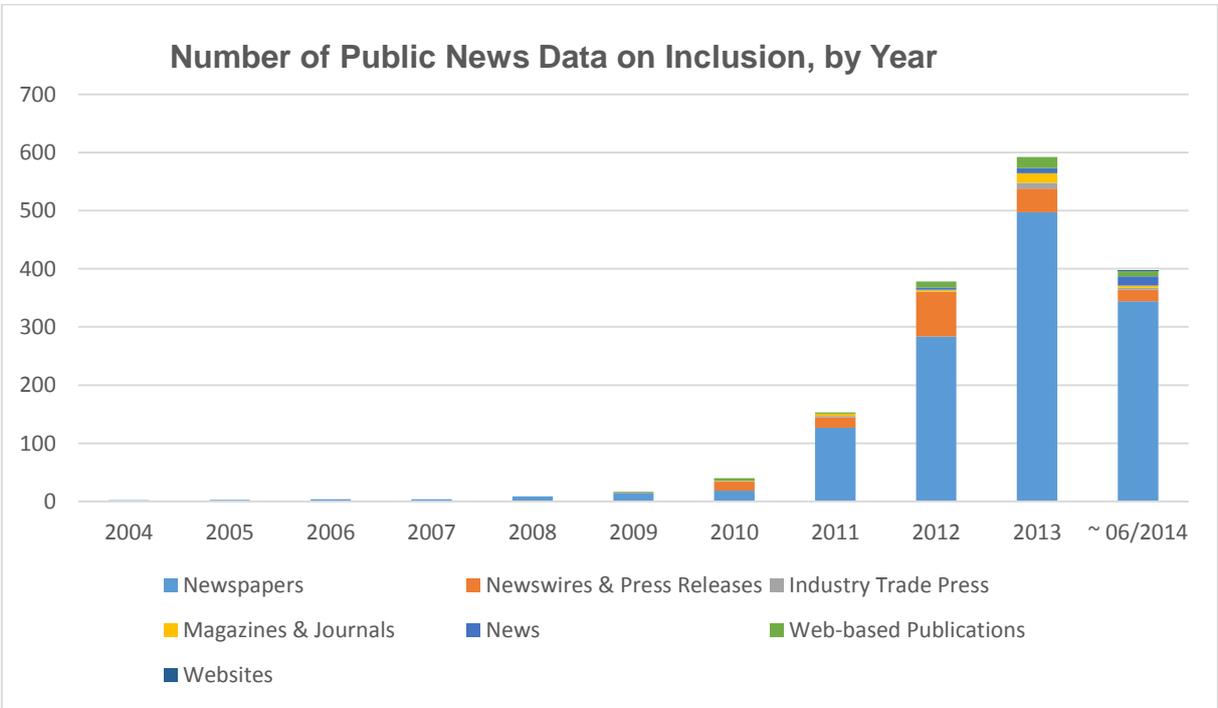


Figure 2: The number of public news data on inclusion by year

Collecting public news data provided the possibility to understand the overarching discourse on inclusion within the management domain and to identify the primary sources to which for-profit organizations in general and our focal organization in particular relate themselves (Maguire and Hardy, 2009). Texts associated with the *regulative pillar* include federal and state regulations as well as governmental advisory reports. These data were collected because they highlight the regulative framework of our focal organization. Finally, texts connected to the *cognitive pillar* refer to authors of the scientific domain, who are considered authoritative and play a significant role in establishing scientific facts around the concept of inclusion.

In a subsequent, upcoming step, we will collect **archival records** of our focal organization. These organizational records will be complemented by **semi-structured interviews** with individuals of our focal organizations such as commissioners of inclusion and employees with and without disabilities. In order to gain insights on the social and environmental conditions, **non-participant observations** will be conducted at the organization's work spaces for a limited number of working days.

Data analysis

Following Suddaby and Greenwood (2005) and Berg (1989), we analyzed our preliminary data using a modified version of content analysis. In doing so, the analysis was composed of two stages. Using *Atlas.Ti 7.1* computer software, we first read through the collected data to analyze the manifest content –“those elements that are physically present and countable”– (Berg, 1989: 107). Thus, we aimed at identifying the major actors and their arguments with regards to the discourse on inclusion. We focused on excerpts in which actors problematized inclusion as well as excerpts that offered solutions. During this procedure we produced 143 data

<i>Original text excerpt</i>	<i>“The economy cannot afford to abstain from the potential of young, disabled people in times of skills shortage.”</i>
<i>First phase coding</i>	Position towards Inclusion: Pro Type of rationale: Focus on economy

Table 1: Selected coding examples

In a second, upcoming stage we will address the data’s latent content or “deep structure” (Berg, 1989: 107).

Preliminary Findings

1. Dominating actors: Best practice companies, governmental authorities and charities

Our analysis of the normative pillar reveals that the discourse on inclusion is dominated by reports on best practice companies. For-profit companies are repeatedly described to advocate the inclusion of disabled personnel by means of communicating their accomplishments as well as their specific future goals. This accounts for multinational enterprises from the insurance as well as the software industry as the following example exemplifies:

“The German software company SAP announced to staff 1% of its personnel by employing autistics. Based on the current number of employees this would make up 650 autistic employees.” (Source: Handelsblatt 2013a).

In addition to that, the normative discourse refers to small and medium sized for-profit companies from amongst others the manufacturing industry, while non-profit companies are also embedded in the public discourse.

The second major group of actors, which are related to the normative inclusion discourse, are *governmental authorities* from the federal as well as the state level. As such the German Federal Minister of Labour and Social Affairs, the Federal Government Commissioner for Matters Relating to Disabled People, the Federal Employment Agency as well as State Ministers of Labour and Social Affairs facilitate the discourse on inclusion.

“The German government wants to ease the life of disabled people and provide equal opportunities by means of 200 (ongoing) measures. The leading Federal Minister of Social Affairs, Ursula von der Leyen (CDU), stated during the presentation of the national measures plan, which aims at implementing the United Nations Convention on the Rights of Persons with Disabilities, that:”
It is our goal that the 9.6% disabled citizens are naturally included.” (Source: StuZ 2011)

Finally non-profit associations and charities play an important role in the normative discourse, while other actors such as public or private research institutes or the Confederation of German Employers’ Associations are hardly appear in the public discourse on inclusion.

2. Dominance of advocating rather than opposing actors

Secondly, we found that the discourse on inclusion is almost exclusively *in favour of* institutionalizing inclusion in for-profit organizations. Apart from two opposing comments, which criticize the concept as well as its organizational implementation, all actors manifestly advocate the institutionalization of inclusion in for-profit organizations.

In this regard, three overarching rationales are repeatedly drawn upon. First of all, public actors refer to the individual performance capabilities of disabled people *without specifying the type of handicap*.

“Employing people with disabilities has major advantages: They are frequently not impaired but need to be considered as high-performers due to their dedication and discipline.” (Tagesspiegel 2012)

“People with disabilities can play their strengths when it is about structured operational procedures: hard work, accuracy and reliability” (StuZ 2012).

Secondly, the individual performance capabilities of disabled people are further exemplified with regards *to specific handicaps such as autism and blindness*. In this regard, the organizational value for institutionalizing inclusion is stressed because these people have unique capabilities such as special memorizing or computational skills.

“Autists are above-average intellectually gifted and highly concentrated.” (taz 2013)

“During early childhood autists already start focussing on specific areas such as numbers. Thus, they become specialists, which makes them way better than others.” (Handelsblatt 2013a).

Finally, overarching economic rationales play a significant role in advocating the institutionalization of inclusion in for-profit organizations. Due to the skills shortage in many industries, advocates claim that it is necessary to utilize the potential of disabled people by including them in regular organizational settings.

“In times of skills shortage, the economy cannot afford wasting the potential of young, disabled people.” (MoPo 2014)

“These people could cushion the effects of skills shortage in many industries.” (Handelsblatt 2013).

“Including disabled people makes sense especially in times of skills shortage.” (Handelsblatt 2014).

Summing up our preliminary findings, these three main rationales, which are supported by *group-level, legal* as well as *financial arguments*, represent the core for advocating the institutionalization of inclusion in for-profit organizations. However, the finding that the normative discourse on inclusion hardly contains opposing actors is somehow surprising. Thus, the management discourse does not resonate to findings from the educational domain in which proponents and opponents dominate the discourse on inclusion collectively. Thus, we will address this finding by analysing the latent content during further analysis.

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